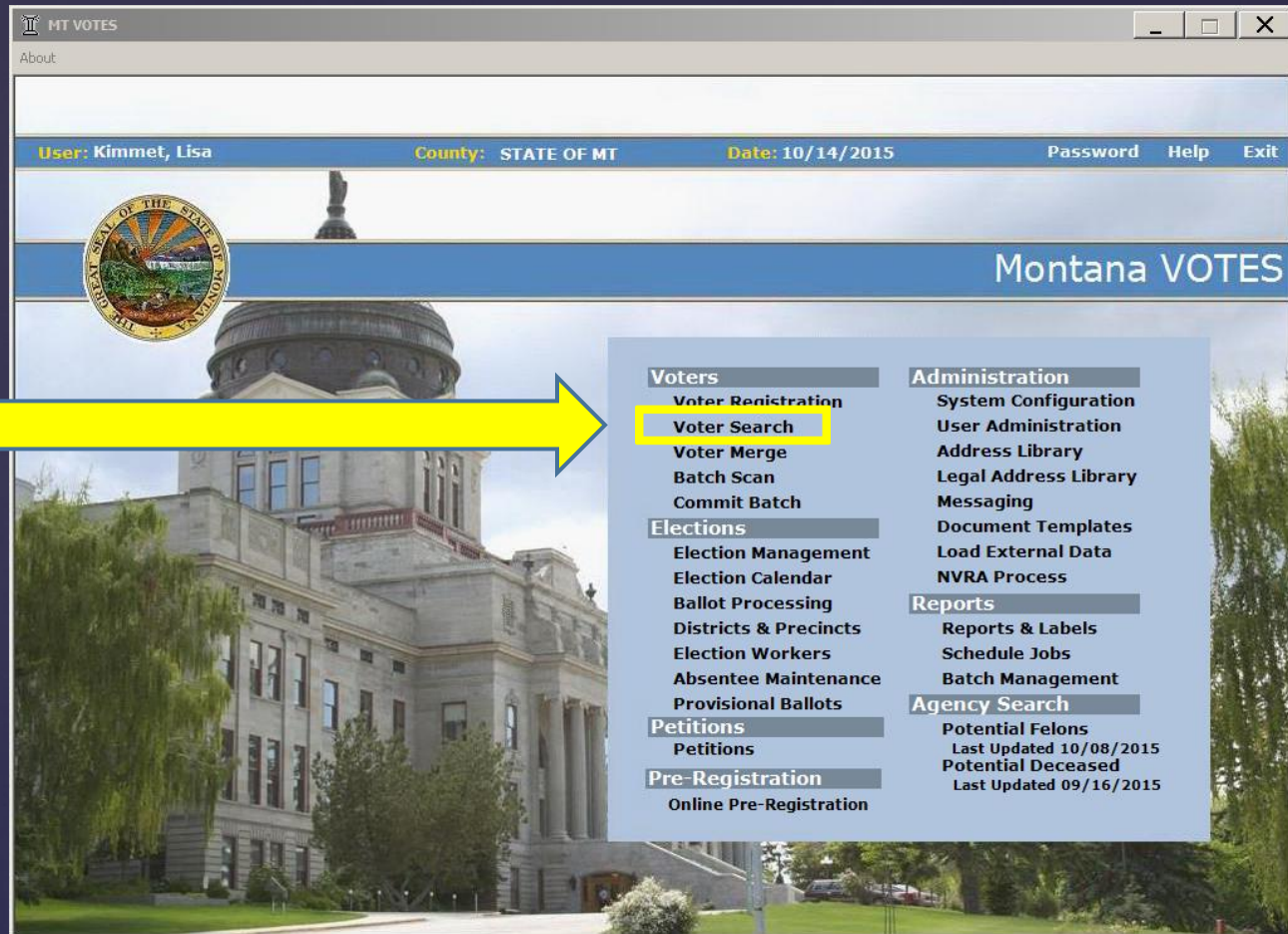


# Montana Election Administrator Certification Training

## {Using “Search” in MT Votes

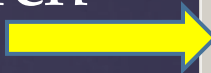
Secretary of State Linda McCulloch  
Elections and Government Services  
February 2016





# Searching in MT Votes

Categories  
to Search



Scope  
of  
Search

The screenshot shows the 'Voter Search' application window. At the top, there's a title bar with the application name and standard window controls. Below the title bar, there's a 'Reports' section with a 'Select Saved/Published Search' dropdown and a 'Run Search' button. A yellow arrow points from the text 'Categories to Search' to this dropdown. Below the 'Reports' section, there's a tabbed interface with tabs for 'Output Name', 'Activity Extract', 'Comment Residence Address', 'Custom Fields Absentee', 'Save Mailing Address', 'Duplicate Req. Districts', and 'Undeliverable Precincts Status'. The 'Output Name' tab is selected. Below the tabs, there are input fields for 'Last Name', 'First Name', 'Middle Name', 'Gender' (a dropdown), 'Old Voter ID', 'State ID', and 'SSN'. To the right of these fields, there's a 'Search Options' section with checkboxes for 'Include Alternate Name', 'Include Confidential', 'Show ONLY Confidential', 'Soundex', and 'Voters without Signatures'. Below the 'Search Options' section, there's an 'Age' section with 'Birth Date From' and 'To' fields, 'Age From (years)' and 'To' fields, and 'Birth Month' and 'Day' fields. Below the 'Age' section, there's a 'Scope' section with radio buttons for 'State' and 'County'. A yellow arrow points from the text 'Scope of Search' to these radio buttons. To the right of the 'Scope' section, there's a 'Show Signatures' checkbox and buttons for 'Search', 'Voter Count', and 'Clear'. Below the 'Scope' section, there's a large empty area for search results. At the bottom of the window, there are buttons for 'View Summary', 'Full Image', 'Select', and 'Close'.

Search Screen

# Registration Status



**Voter Search**

Reports [Help](#)

Select Saved/Published Search

Output	Activity	Comment	Custom Fields	Save	Duplicate Req.	Undeliverable
Name	Extract	Residence Address	Absentee	Mailing Address	Districts	Precincts
						<b>Status</b>

**Status/Status Reason** [Select All](#) [Unselect All](#)

<input checked="" type="checkbox"/> Active	<b>Flags</b>
<input type="checkbox"/> Cancelled	
<input checked="" type="checkbox"/> Inactive	
<input checked="" type="checkbox"/> Late Registration	
<input type="checkbox"/> Pending	
<input checked="" type="checkbox"/> Provisional	

<input type="checkbox"/> MVD Verified Only
<input type="checkbox"/> SSA Verified Only
<input type="checkbox"/> Not MVD / SSA Verified
<input type="checkbox"/> Missing Voter Registration Card
<input type="checkbox"/> Marked in Ballot Processing
<input type="checkbox"/> CASS Comments Exist
<input type="checkbox"/> HCF Resident

**Scope**

☐ State ☒ County  ☐ Show Signatures

# Registration Status Search

Click on  
the status  
to expand  
and  
choose  
the sub-  
statuses  
you want  
to search  
on.

**Voter Search**

Reports [Help](#)

Select Saved/Published Search

Output	Activity	Comment	Custom Fields	Save	Duplicate Req.	Undeliverable
Name	Extract	Residence Address	Absentee	Mailing Address	Districts	Precincts
Status						

**Status/Status Reason** [Select All](#) [Unselect All](#)

- ☒ Active
- ☐ Cancelled
- ☒ Inactive
  - ☒ NVRA
  - ☒ Undeliverable Ballot
  - ☒ moved to another county
- ☒ Late Registration
  - ☒ New
  - ☒ County to County
  - ☒ Precinct to Precinct
- ☐ Pending

**Flags**

- ☐ MVD Verified Only
- ☐ SSA Verified Only
- ☐ Not MVD / SSA Verified
- ☐ Missing Voter Registration Card
- ☐ Marked in Ballot Processing
- ☐ CASS Comments Exist
- ☐ HCF Resident

**Scope**

☐ State ☒ County

☐ Show Signatures

Sort by  
any  
heading  
by  
clicking  
on the  
heading

The screenshot shows the 'Voter Search' application window. At the top, a status message reads 'Query executed successfully. Showing total 127 of 127 records.' Below this is a 'Select Saved/Published Search' dropdown and a 'Run Search' button. The main area contains several tabs: 'Output', 'Activity', 'Comment', 'Custom Fields', 'Save', 'Duplicate Req.', and 'Undeliverable'. The 'Output' tab is active, showing a table with columns: 'Name', 'Extract', 'Residence Address', 'Absentee', 'Mailing Address', 'Districts', 'Precincts', and 'Status'. Below the table, there are two sections: 'Status/Status Reason' and 'Flags'. The 'Status/Status Reason' section has a tree view with checkboxes for 'Active', 'Cancelled', 'Inactive', 'Late Registration' (which is expanded to show 'New', 'County to County', and 'Precinct to Precinct'), 'Pending', and 'Provisional'. The 'Flags' section has checkboxes for 'MVD Verified Only', 'SSA Verified Only', 'Not MVD / SSA Verified', 'Missing Voter Registration Card', 'Marked in Ballot Processing', 'CASS Comments Exist', and 'HCF Resident'. At the bottom, there is a 'Scope' section with radio buttons for 'State' (selected) and 'County', a dropdown for county selection, a 'Show Signatures' checkbox, and buttons for 'Search', 'Voter Count', and 'Clear'. A yellow arrow points to the table header row, which contains the following columns: 'ID', 'Last Name', 'First Name', 'Middle Name', 'Name Suffix', 'Status', 'Date of Birth', 'City (RA)', 'Precinct', 'Split', and 'County'.

ID	Last Name	First Name	Middle Name	Name Suffix	Status	Date of Birth	City (RA)	Precinct	Split	County
----	-----------	------------	-------------	-------------	--------	---------------	-----------	----------	-------	--------

6 Search Late Registrants





The screenshot displays the "Voter Search" application window. At the top, there's a title bar with standard Windows controls and a "Help" link. Below the title bar, a "Reports" section is visible. The main area is titled "Select Saved/Published Search" and contains a dropdown menu and a "Run Search" button. A yellow arrow points from the "Absentee" tab in the "Custom Fields" section to the "Absentee Type" and "Absentee Request Source" filter lists. Another yellow arrow points from the left edge of the screen to the "Scope" section. The "Absentee Type" list includes options like "Absentee List", "Civilian Overseas", "Election Specific", "Military Domestic", "Military Overseas", and "Seasonal". The "Absentee Request Source" list includes "Absentee Team", "Conservation", "Democrats", "E-mail", "FPCA", "FPCA-EAS", "Fax", and "In-Person". To the right, there are fields for "Address", "City", "State", "Zip", and "Country". Below these, there are checkboxes for "Voters without an active date range" and "Voters with blank Absentee Status". The "Scope" section at the bottom left has radio buttons for "State" and "County", a dropdown menu, and a "Show Signatures" checkbox. A "Search" button is next to it. On the far right, there are buttons for "Voter Count" and "Clear". The bottom of the window features a large grey area for results, with "View Summary", "Full Image", and "Select" buttons below it. Finally, navigation buttons "<", ">", and "Close" are at the very bottom.

# <sup>7</sup> Absentee Type Search

Choose the  
absentee  
type



**Voter Search**

Reports

Query executed successfully. Showing first 1 - 1000 of 1966 records. Total records: 1966. [Help](#)

Select Saved/Published Search

Output	Activity	Comment	Custom Fields	Save	Duplicate Req.	Undeliverable
Name	Extract	Residence Address	<b>Absentee</b>	Mailing Address	Districts	Precincts

**Absentee Type**

- ☐ Absentee List
- ☒ Civilian Overseas
- ☐ Election Specific
- ☒ Military Domestic
- ☒ Military Overseas
- ☐ Seasonal

**Absentee Request Source**

- ☐ Absentee Team
- ☐ Conservation
- ☐ Democrats
- ☐ E-mail
- ☐ FPCA
- ☐ FPCA-EAS
- ☐ Fax
- ☐ In-Person

**Address**

City  State  Zip

Country

**Absentee Status**

☐ Voters without an active date range

☐ Voters with blank Absentee Status

**Scope**

☒ State ☐ County

☐ Show Signatures

ID	Last Name	First Name	Middle Name	Name Suffix	Status	Date of Birth	City (RA)	Precinct	Split	County
----	-----------	------------	-------------	-------------	--------	---------------	-----------	----------	-------	--------

# 8 Absentee Type Search





Note that  
this voter  
does not  
have an  
Absentee  
Status

Select the precincts you want – only the voters in the precinct(s) selected display

The screenshot shows the 'Voter Search' application window. At the top, a status bar indicates 'Query executed successfully. Showing total 579 of 579 records.' Below this is a 'Select Saved/Published Search' dropdown and a 'Run Search' button. A tabbed interface is visible with tabs for 'Output', 'Activity', 'Comment', 'Custom Fields', 'Save', 'Duplicate', 'Query', 'Unselect', and 'Enable'. The 'Precincts' tab is selected and highlighted with a yellow box. A yellow arrow points to this tab from the right. The 'Precincts' tab contains a list of precincts under the heading 'Precinct Name (Code)'. The first item, 'P 1 (1)', is checked. Other items include 'P 10 (10)', 'P 11 (11)', 'P 12 (12)', 'P 13 (13)', 'P 14 (14)', 'P 15 (15)', 'P 16 (16)', 'P 2 (2)', and 'P 3 (3)'. A yellow arrow points to this list from the left. To the right of the list is a 'Split Code' field. Below the precinct list is a 'Scope' section with radio buttons for 'State' and 'County', a dropdown for 'Carbon', and a 'Show Signatures' checkbox. There are also 'Search', 'Voter Count', and 'Clear' buttons. At the bottom, there is a table with columns: ID, Last Name, First Name, Middle Name, Name Suffix, Status, and Date of Birth. A yellow arrow points to the table from the left. Below the table are buttons for 'View Summary', 'Full Image', and 'Select'. At the very bottom are navigation buttons: '<', '>', and 'Close'.

Voter Search

Reports

Query executed successfully. Showing total 579 of 579 records. [Help](#)

Select Saved/Published Search  Run Search

Output Activity Comment Custom Fields Save Duplicate Query Unselect Enable

Name Extract Residence Address Absentee Mailing Address Districts **Precincts** Status

Select All Unselect All

Precinct Name (Code)

☒ P 1 (1)

☐ P 10 (10)

☐ P 11 (11)

☐ P 12 (12)

☐ P 13 (13)

☐ P 14 (14)

☐ P 15 (15)

☐ P 16 (16)

☐ P 2 (2)

☐ P 3 (3)

Split Code

Scope

☐ State ☒ County Carbon ☐ Show Signatures Search Voter Count Clear

ID	Last Name	First Name	Middle Name	Name Suffix	Status	Date of Birth
----	-----------	------------	-------------	-------------	--------	---------------

View Summary Full Image Select

< > Close

Use the  
wildcard

The screenshot shows the 'Voter Search' application window. At the top, a status message reads 'Query executed successfully. Showing total 17 of 17 records.' Below this is a 'Select Saved/Published Search' dropdown menu and a 'Run Search' button. A horizontal tab bar contains several options: 'Output', 'Activity', 'Comment', 'Custom Fields', 'Save', 'Duplicate Req.', 'Undeliverable', 'Name', 'Extract', 'Residence Address', 'Absentee', 'Mailing Address', 'Districts', 'Precincts', and 'Status'. The 'Name' tab is selected and highlighted with a yellow box. A yellow arrow points from the text 'Use the wildcard' to the 'Name' tab. Below the tabs, there are input fields for 'First Name', 'Middle Name', 'Gender', 'Old Voter ID', 'State ID', and 'SSN'. The 'First Name' field contains '%%', indicating a wildcard search. To the right of these fields is a 'Search Options' section with checkboxes for 'Include Alternate Name', 'Include Confidential', 'Show ONLY Confidential', 'Soundex', and 'Voters without Signatures'. Below this is an 'Age' section with 'Birth Date From' (01/01/1800), 'To' (12/31/1905), 'Age From (years)', and 'Birth Month' (dropdown) and 'Day' (input). A yellow arrow points from the text 'Search by birth date' to the 'Birth Date From' field. At the bottom, there is a 'Scope' section with radio buttons for 'State' (selected) and 'County', and a dropdown menu showing 'Yellowstone'. There are also checkboxes for 'Show Signatures' and buttons for 'Search', 'Voter Count', and 'Clear'. At the very bottom, a table header is visible with columns: ID, Last Name, First Name, Middle Name, Name Suffix, Status, and Date of Birth.

Search  
by  
birth  
date

# Search by Name/Birthdate

**Voter Search**

Reports

Query executed successfully. Showing first 1 - 1000 of 2140 records. Total records: 2140. [Help](#)

Select Saved/Published Search Run Search

Output	Activity	Comment	Custom Fields	Save	Duplicate Req.	Undeliverable
Name	Extract	Residence Address	Absentee	Mailing Address	Districts	Precincts

Last Name:   
 First Name:   
 Middle Name:   
 Gender:   
 Old Voter ID:   
 State ID:   
 SSN:

**Search Options**

☐ Include Alternate Name   ☐ Include Confidential  
☐ Show ONLY Confidential   ☐ Soundex  
☐ Voters without Signatures

**Age**

Birth Date From:  To:   
 Age From (years):  To:   
 Birth Month:  Day:

**Scope**

☐ State   ☒ County   
☒ Show Signatures   Search   Voter Count   Clear

ID	Signature	Last Name	First Name	Middle Name	Name Suffix
----	-----------	-----------	------------	-------------	-------------

# Search by name and include signatures

**Voter Search**

Reports

Query executed successfully. Showing total 157 of 157 records. [Help](#)

Select Saved/Published Search

Output	Activity	Comment	Custom Fields	Save	Duplicate Req.	Undeliverable
Name	Extract	Residence Address	Absentee	Mailing Address	Districts	Precincts
Status						

Last Name

First Name

Middle Name

Gender

Old Voter ID

State ID

SSN

**Search Options**

☐ Include Alternate Names

☒ Show ONLY Confidential

☐ Voters without Signatures

**Age**

Birth Date From  To

Age From (years)  To

Birth Month  Day

**Scope**

☒ State ☐ County

☐ Show Signatures

ID	Last Name	First Name	Middle Name	Name Suffix	Status	Date of Birth
----	-----------	------------	-------------	-------------	--------	---------------

# Search Confidential Voters

- Search for Comments
- Search Activity for a given election
- Search Undeliverable notes
- Search Duplicate registrations
- Search mailing or residential addresses

## Other Searches

Voter Search

Reports

Query executed successfully. Showing total 171 of 171 records. [Help](#)

Select Saved/Published Search  Run Search

Output Activity Comment Custom Fields Save Duplicate Req. Undeliverable

Residence Address **Absentee** Mailing Address Districts Precincts Status

Output Format

☒ Text File Delimiter : Comma (CSV) ☒ Include Row Header

☐ XML Format

File Path  Browse

☒ Include Summary Extract

Scope

☒ State ☐ County  Show Signatures Search Voter Count Clear

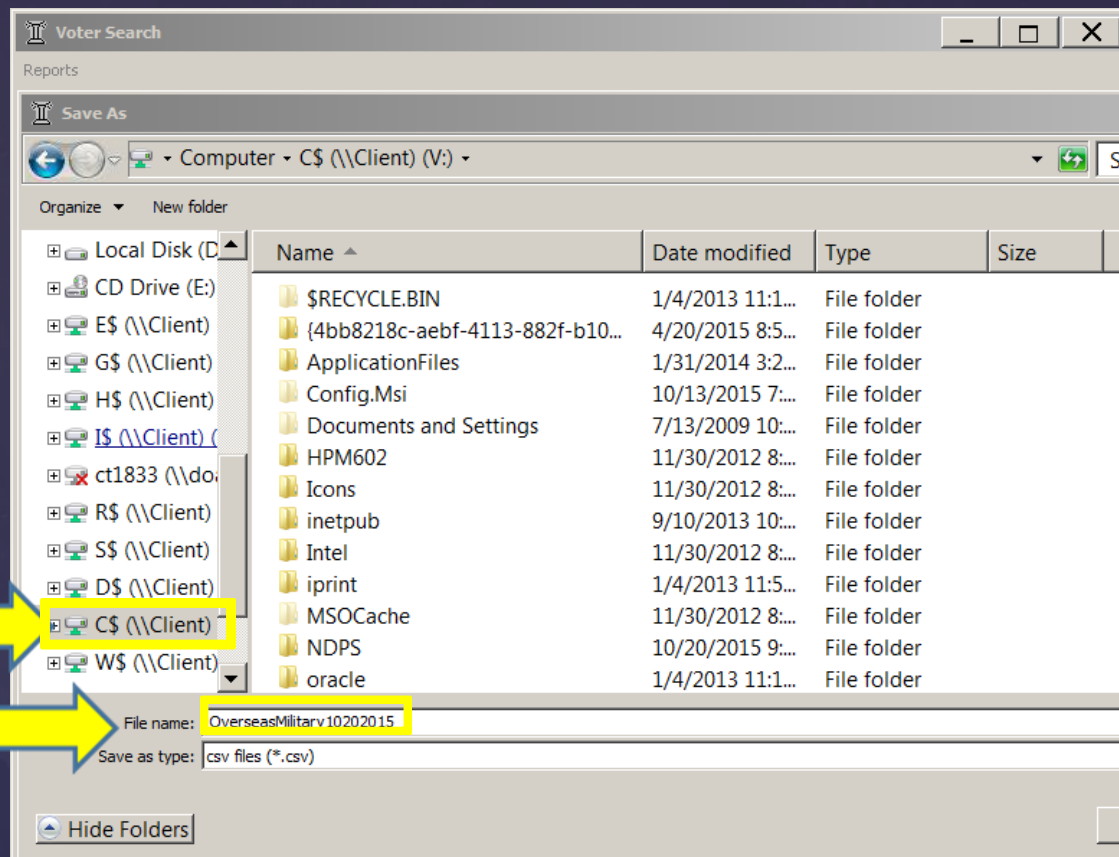
ID	Last Name	First Name	Middle Name	Name Suffix	Status	Date of Birth
----	-----------	------------	-------------	-------------	--------	---------------

Browse to  
your "C"  
Drive

# 15 Extracting Search Results



Choose  
“C\$” Drive,  
give the file  
a name, hit  
the “save”  
button



# Extracting Search Results

**Voter Search**

Reports

Query executed successfully. Showing total 171 of 171 records. [Help](#)

Select Saved/Published Search

Run Search

Output	Activity	Comment	Custom Fields	Save	Duplicate Req.	Undeliverable	
Name	<b>Extract</b>	Residence Address	<b>Absentee</b>	Mailing Address	Districts	Precincts	Status

Output Format

☒ Text File Delimiter : Comma (CSV) ☒ Include Row Header

☐ XML Format

File Path V:\OverseasMilitary10202015.csv Browse

☒ Include Summary

Extract

Scope

☒ State ☐ County  Show Signatures Search Voter Count Clear

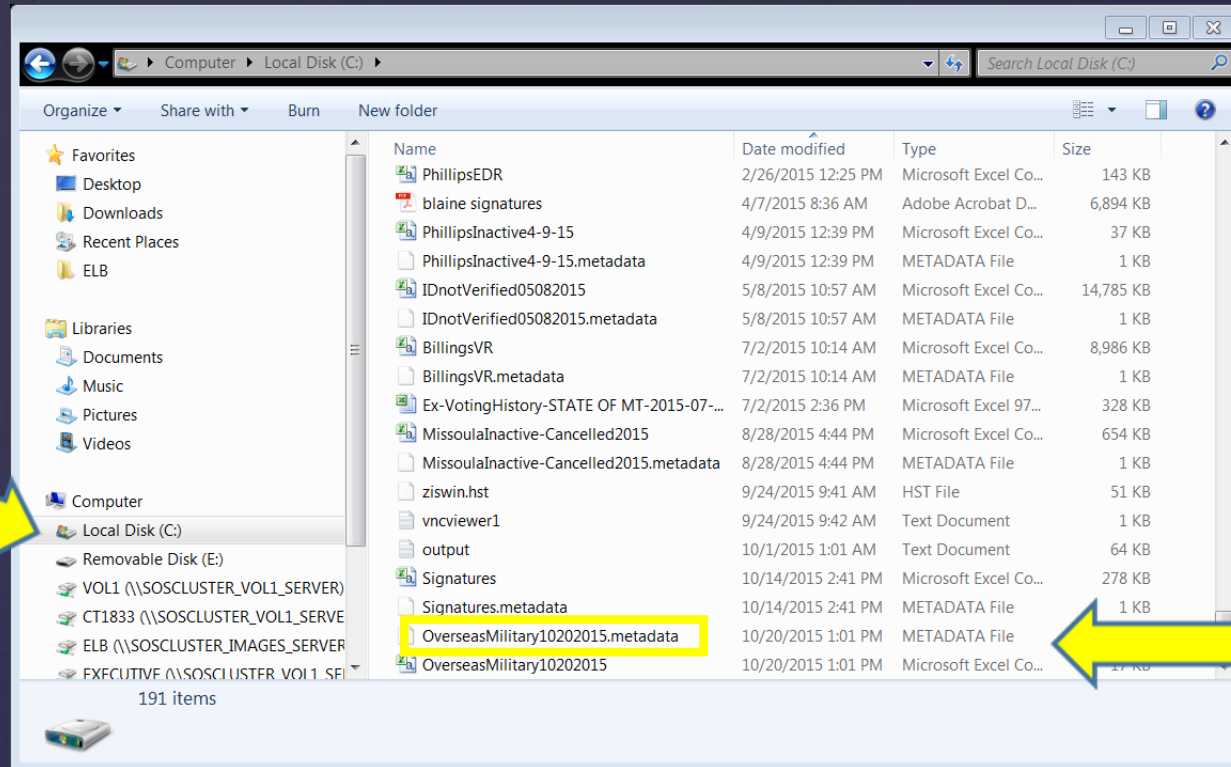
ID	Last Name	First Name	Middle Name	Name Suffix	Status	Date of Birth
----	-----------	------------	-------------	-------------	--------	---------------

Select  
"Extract"



# 17 Extracting Search Results

Go to the  
“C” drive  
on your  
local  
computer.



# Extracting Search Results

OverseasMilitary10202015 - Microsoft Excel

Picture Tools

File Home Insert Page Layout Formulas Data Review View Add-Ins Format

Paste

Clipboard

Font

Alignment

Number

Styles

Conditional Formatting

Format as Table

Cell Styles

Picture 3

	A	B	C	D	E	F	G	H	I	J
	Voter ID	Last Name	First Name	Middle Na	Status	Date of Birth	City (RA)	Precinct	Split	County
1							BONNER	POTO92	POTO92.5	Missoula
2							HELENA	P27	P27.2	Lewis & Clark
3							REXFORD	3_PREC	6721	Lincoln
4							HELENA	P04	P04.1	Lewis & Clark
5							MISSOULA	STJ100E	STJO100E.	Missoula
6							EAST HELE	P20	P20.4	Lewis & Clark
7							DILLON	PREC_06	1	Beaverhead
8							BILLINGS	56.3	4	Yellowstone
9							GLASGOW	5GNE	4	Valley
10							FLORENCE	23_PCT	2	Ravalli
11							POLSON	POL 2	3	Lake
12							MISSOULA	ARTSK91W	RATTL91W	Missoula
13							SILESIA	1	3	Carbon
14							BILLINGS	49.1	3	Yellowstone
15							CLANCY	PREC.09	1.09	Jefferson
16							CLANCY	PREC.09	1.09	Jefferson
17							MISSOULA	SENR95	SENR95.1	Missoula
18							MISSOULA	SENR95	SENR95.1	Missoula
19							BILLINGS	54.1	4	Yellowstone
20							INGOMAR	PREC 26	1	Rosebud
21										

OverseasMilitary10202015

Ready

Sort,  
remove  
columns  
you don't  
need, and  
save the  
file

19  
Format your extracted Excel file

# Use MT Votes Search frequently!

- ✓ to ensure your data is
  - ✓ accurate
  - ✓ up to date
- ✓ to get quick numbers for
  - ✓ voter registration status
  - ✓ absentee status
- ✓ check birth dates/ages of voters
- ✓ check for anomalies in your data